

Session 3: Module 1 - Introduction to Participant Folder

FINAL

Description	Text
1. Introduction	Welcome to Session 3 Module 1 of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Duration	Session #3 should take about 60 minutes to complete all of its modules.
3. Overview	Session 3 is a general overview of the tabs/screens in the Participant Folder and a detailed review of some of the functionality only available via the Participant Folder.
4. Objectives_1	After reviewing all of the modules in this session, you will be able to:
	Understand and navigate the screens in the Participant Folder
	Recognize the icons; and
	Use menu options to perform certain functions such as managing notes and alerts and scanning documents.
5. Start	Participant Folder
6. PF3_1	The purpose of the participant folder is to display a participant's information that has been saved to the database. It displays both data collected during the certification process and historical information such as benefit history and anthropometric measurements. It also allows you access to update participant information outside of the Certification Guided Script process.
7. OpenPF	In Session 2, you learned how to use the Participant Search and Participant List to find participants.
	Once you've searched for and selected a participant on the Participant List, you can open the Participant Folder by:
	double-clicking on the participant;
	clicking on the Open Participant Folder icon;
8. Important	or clicking on Participant List on the menu bar and selecting the Open Participant Folder option.
	Always be patient when opening participant folders. Do NOT be a "happy clicker" (you know who you are if you are one). M-SPIRIT has to gather a lot of data to display for the participant and this can take up to 5-10 seconds. Trust your click and give M-SPIRIT the time needed to perform its activity.

9. OpenPF2_2	Once a participant folder has been opened, just like with the Participant List screen, a button appears on the START taskbar at the bottom of your desktop.
	The Participant List screen remains open throughout your M-SPIRIT session. Closing it also closes the clinic application.
	When a participant folder is opened, it displays on top of any other open screens.
10. <openpf>	Double-click on Bailey Sunshine to open her Participant Folder.
11. <openpf1>	Once a Participant Folder is opened, a button appears on the taskbar at the bottom of your desktop.
12. <openpf2>	The Participant Search/List screen remains open behind the Participant Folder.
	You can toggle between the Participant List and the Participant Folder by clicking the buttons on the taskbar.
	Click the Clinic button to switch back to the Participant List screen while keeping the Participant Folder open.
13. <openpf3>	Both the Participant List and the Participant Folder can remain open at the same time.
14. Open PF2_3	The Participant Folder's button displays the participant's first name, last name, state WIC ID and Household ID.
	The greater the number of buttons displayed on your taskbar the smaller they become resulting in less of the name being viewable.
15. OpenPF3	M-SPIRIT will let you know if you have already opened a folder and try to do so again.
16. <openagain>	We've already opened Bailey Sunshine's Participant Folder.
	If we try to open her folder again, the system will give us a message indicating the folder is already open.
	Double-click on Bailey Sunshine to see the message.
17. <openagain1>	The message reads "Another copy of folder for this Participant is already opened. Please use the existing folder."
	Click the OK button on the message.
18. <openagain2>	M-SPIRIT moves the folder on the top of any other screens currently open on your desktop.
19. Tip1	If you receive a system message indicating a participant folder is already opened and the folder does not appear and doesn't seem to be open, it is probably unable to complete the process due to a system or CPA-generated alert that has opened behind other windows on the desktop and is currently hidden from view.

20. <alertopen>	Double-click on Booney Sunshine to open her Participant Folder.
21. <alertopen1>	If the participant folder doesn't open on top of the Participant List screen and it seems as if M-SPIRIT is done trying to open the folder, you will probably double-click on her name again. So, do that.
22. <alertopen2>	If you get this message indicating the folder is already open, odds are a system-generated or user-defined alert has opened BEHIND other screens that are open on your desktop.
	M-SPIRIT is unable to finish the process of opening a Participant Folder until you have closed the alert(s).
	But first, we have to click OK on this message.
23. <alertopen3>	If we look at the buttons on the taskbar, we can see a button for Display Alerts and an incomplete button for the Participant Folder we are trying to open.
	However, sometimes all that will appear is the button with the participant folder icon which is missing the participant details indicating that the folder hasn't been opened and is in a frozen state.
	If a button doesn't display for the alert, it is still most likely hidden BEHIND some of your open screens. Simply minimize the screens to find the alert, read it, close it and the participant folder will open.
	Since in this instance we do have a button for the "hidden" alert, click the Display Alerts button to bring the alert in front of the other open screens.
24. <alertopen4>	Once we've read the alert, we need to either delete it or close it so that the Participant Folder can open. Click the Close button.
25. <alertopen6>	<no script>
26. SystemAlerts1	M-SPIRIT has certain system-generated alerts to remind the CPA when specific information must be collected.
	The CPA Review alert appears before the Participant Folder opens whether it is opened from the Participant List screen or from within another Participant Folder, as is the case with the Work with Another Member function, which we will discuss a bit later.
	These alerts are defined at a member level, which means that the alert only appears if the participant folder to whom the alert actually applies is opened. Because of this, they are not often very useful
27. <sysalerts>	Double-click on Nubbins Sunshine to open her Participant Folder

28. <sysalerts1>	The most common member-level CPA Review alerts provide reminders for pending information such as ID and residency indicate if a food prescription needs to be created, and whether an infant still needs blood work before their first birthday.
29. Tip2	Press the Enter key on your keyboard to quickly and easily close an alert after reading it.
30. Open PF5_Multiple1	M-SPIRIT does allow multiple Participant Folders to be open at the same time.
	However, DO NOT open more than one household folder at a time
	This causes errors within M-SPIRIT to arise.
31. SamePF	More than one user can open the same participant folder at one time.
	M-SPIRIT will not notify you if someone else has the same folder open. It is OK for two people to have the same folder open as long as only one is making changes to the record.
	However, if more than one user is making changes in the same record at the same time, data may not save correctly.
32. <demo>	The Participant Folder always opens to the Demographics Tab.
	The blue title bar at the top of each folder displays general information including: the participant's name; their system-calculated age if an infant, child or postpartum woman and weeks gestation if a pregnant woman; the State WIC ID and Household ID.
33. PF3_2	The Participant Folder is designed to imitate a hanging file folder;
	Each tab includes content specific to its label.
	Clicking a tab is similar to opening a different file folder; it changes the view to reveal content that is different and specific to the tab's description.
34. <demo1>	Some of the tabs, such as Demographics, have sub-tabs on their right margins.
35. <demo2>	If a participant is high risk, the tabs in the folder are bright yellow, which serves as a visual reminder that extra follow-up may be required with this participant.
36. PF4_2	Most of the time, you can update the information collected in the fields in the Participant folder at any time.
	A general rule to follow, which we will reiterate in Sessions 4, 5 and 6 is to enter information into the Participant Folder during a participant's certification period. If a certification is due and is to be started, information should be collected or updated while in the Certification Guided Script, or CGS, instead of via the Participant Folder.
	When a certification is incomplete or in progress, the fields in a locked folder are disabled rendering them as view-only.

37. <locked>	In "locked" folders all of the fields are disabled or grayed out.
38. SaveMsg	When you have changed data, the Do You Want to Save message appears when selecting an icon, menu activity, or other tab.
39. SaveMsg1	This includes the Demographics and Health Information tabs. M-SPIRIT generally will prompt you to save any changes when exiting either of these screens.
40. <save>	Click on the Health Information tab.
41. <save1>	M-SPIRIT appears as if it has changed tabs. But, the system will ask if you want to save any potential changes made to the Demographics screen.
	If we had made changes to the Demographics screen, we would click the Yes button to save those changes.
	Let's say we did make changes and click the Yes button.
42. <save2>	Before saving any changes, M-SPIRIT performs a validation to ensure that all required fields in Demographics have been completed.
	A message appears listing all of the required fields that have not been completed.
	Click OK on the message.
43. <save3>	M-SPIRIT then highlights all the required fields listed in that message in orange.
	Click the AdditionalInfo2 sub-tab to see the rest of the required fields.
44. <save4>	Instead of filling in the required fields, let's click the Health Information tab again.
45. <save5>	The "Do you want to save?" message appears again. This time, let's click the No button.
46. <save6>	When you click No, M-SPIRIT opens the Health Information tab without saving any changes that may have been made to Demographics.
	Let's go back to Demographics by clicking on the tab.
47. <save7>	<no script>

48. DropDowns	In M-SPIRIT, the State agency has the ability to modify some of the items or options that appear in drop-down list fields.
	If there are options you would like to see added to a drop-down list your local agency WIC coordinator can submit suggested changes via a form on the M-SPIRIT Resource Page on the Montana WIC web site.
	All suggestions will be considered and implemented only after determined applicable or appropriate for the entire state.
49. <pficons>	Some of the icons in the Participant Folder are the same as in the Participant List Screen, such as: Manage Waiting Lists, System Outputs, System Tools, Exit Clinic, Toggle Applicants/Participants on Site and Schedule Appointments.
	The icons only available in the Participant Folder include:
	Certification, which opens the Certification Guided Script or CGS;
	Issue Benefits, which opens the screen where you can print benefits;
	and Close Participant Folder.
	Never close the Participant Folder by clicking the X in the top right corner.
50. <pficons1>	A new icon, available in both the Participant Folder and the CGS is the Search icon, which brings the Participant List screen in front of any other screens currently open on your desktop.
	Icons are enabled when you can perform the function. For instance, if a certification cannot be started or benefits cannot be issued, they will be disabled or grayed out.
51. <pfmenus>	The File and Help menus in the Participant Folder are the same as the Participant List.
	We will discuss the Participant Activities and Document Imaging menus in the next modules. (Benefit Management will be reviewed in Session 7.)
52. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.